Procurement Card

Gatton College of
Business and Economics
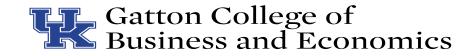
New Procard Holders

- Please make sure you complete your training in MyUKLearning.
  - It must be completed within 30 days
  - Once the training is completed, your card will be mailed to your home address
  - Your card will not be mailed until the training is complete

General Information

- Single Transaction Limit of $5,000
- Do not split a single transaction into two transactions to avoid the $5,000 limit. This is not allowed.
- If you need to make a purchase over the $5,000 limit, please contact the Business Office. We can request a one-time increase.
- Items may only be shipped to the University, not your home address.

General Information

- University is tax-exempt from Kentucky sales tax
  - Provide vendors with the sales tax-exempt number A00276
  - [Tax-exempt certificate](#)
- University is tax-exempt in some states for out-of-state purchases.
  - [Out of state list](#)

Approved Vendors

- Certain categories of items have a contract with the University. Those items must be purchased from an approved vendor.

  - Most popular categories include full-service printing, stationary printing, duplicating, and promotional items.
  - Other categories can be found on the [purchasing website](#).

- Amazon purchases must be purchased using the Enterprise Amazon Business Account, not amazon.com. Contact your department administrator for assistance.

Documentation

- Receipts must contain
  - Vendor Name
  - Detail listing of purchase
    - Item description
    - Quantity
    - Price
  - Transaction date
  - Make sure the receipt is clear and readable
  - Business purpose/explanation for the purchase

Business Purpose

- The 5 W's can help you determine if the expense meets the criteria of a University business purpose.
  - Who: The documentation must note specifically who the expense is for.
  - What: The University needs to know what type of event or activity occurred, or what was purchased. All receipts or invoices must be itemized.
  - Where: Document where the business activity took place.
  - When: Document when an event occurred.
  - Why: Most importantly, substantiate why the expenses are reasonable and appropriate for the university. The "Why" should include the primary reason for the expense.

Upload to FRANsys

- Upload each receipt into FRANsys.
- For questions on how to use FRANsys, please refer to the FRANsys training.

Concur

- You do not build your own reports in Concur.
- Please make sure you complete your user profile settings in Concur.
- Please make sure you have added the business office staff as delegates in Concur.
  - How to Add Delegate for Concur
- Your financial specialist will pull the uploaded information from FRANsys and build the report.
- You will be notified when it is ready to submit.
- Please review the report. Ask your financial specialist if you have any questions. Then submit the report for approval.

Not Allowable Expenses on Procard

- Personal charges are not allowed under any circumstance.
- Capital equipment
- Gift cards
- Research subject payments (only on declining balance procards)
- Artwork (prints, sculptures, processed with a Shopping Cart)
- Consulting Services (processed with a Shopping Cart)
- Equipment Lease/Rental (processed with a Shopping Cart)
- Furniture (cubicles, desks, chairs, tables, processed with a Shopping Cart)
- Graphic Design (processed with a shopping cart)

Helpful Links

- [Procurement Card website](#)

- [Procurement Cardholder Manual](#)

- [Concur Travel & Expense Management website](#)

- [E-7-16: Procurement Cards](#)

- [Purchasing Internal Use Only website](#)

- [AP Quick Reference Guide](#)

Training

- Available in myUKLearning
  - Concur: Review and Complete User Profile Settings
  - FAST Procurement Basics
  - FAST Financial Foundations Procurement Card

Questions?

Any questions reach out to the business office.

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